

How to sign up for e-Delivery on TD Ameritrade

To sign up for e-Delivery for **ALL** TD Ameritrade communication including monthly statements, trade confirmations, and tax documents, follow the steps below or in the attached PDF.

1. Login to your account at <https://www.advisorclient.com/login> using your username and password
2. If you have not already, update to the new AdvisorClient:
 - Click on the box on the right-hand side of the screen to “Try the new AdvisorClient now”
 - Then, click the banner at the top of the page to switch your preferences to the new AdvisorClient and click change preferences so that every time you login, you will be directed to the new AdvisorClient
3. Next, go to the top right-hand corner and click the carrot next to your name
4. Select “My Profile” from the dropdown menu
5. Select “Communication Preferences” in the middle of the screen
6. Click the green “Go Paperless. Set all to electronic delivery.” button
7. Verify that the correct email address is listed and check the confirm box at the bottom of the page. Click the green confirm button
8. Enter your password to confirm your identity and submit

To sign up for e-delivery of **ONLY** tax documents, follow the steps below.

1. Login to your account at <https://www.advisorclient.com/login> using your username and password
2. If you have not already, update to the new AdvisorClient:
 - Click on the box on the right-hand side of the screen to “Try the new AdvisorClient now”
 - Then, click the banner at the top of the page to switch your preferences to the new AdvisorClient and click change preferences so that every time you login, you will be directed to the new AdvisorClient
3. Next, go to the top right-hand corner and click the carrot next to your name
4. Select “My Profile” from the dropdown menu
5. Select “Communication Preferences” in the middle of the screen
6. Click on the blue “Update preferences individually” link
7. Select “Electronic” from the Tax Documents drop down menu and click the green “Update preferences” button
8. Verify that the correct email address is listed and check the confirm box at the bottom of the page. Click the green confirm button
9. Enter your password to confirm your identity and submit



Minnesota Office
7935 Stone Creek Drive, Suite 120
Chanhassen, MN 55317

Contact Us:
Phone: 888-256-6855
www.MDFinancialAdvisors.com

Rhode Island Office
10 Weybosset Street, Suite 903
Providence, RI 02903

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